

North Carolina COVID-19 Vaccine Management System (CVMS)

Provider Portal

Addendum for Scheduling Feature at Point of Care and Vaccine Administration

Version 3

April 16, 2021



NC DEPARTMENT OF
**HEALTH AND
HUMAN SERVICES**





If you have any questions, issues or requests, please go to the
CVMS Help Desk Portal* at https://ncgov.servicenowservices.com/csm_vaccine
You can also call the COVID-19 Vaccine Provider Help Center at (877) 873-6247 and select option 1.
The COVID-19 Vaccine Provider Help Center is available during the following hours:
Monday – Friday: 7:00 AM – 7:00 PM ET
Saturday – Sunday: 10:00 AM – 6:00 PM ET

* On the home page of the CVMS Help Desk Portal, select the "**Vaccine Provider**" option to submit your question, issue, or request.

Providers that are first time users of the CVMS Help Desk Portal will have to follow the steps below:

1. Register for an account on the portal by clicking 'Register' in the top right-hand corner
2. Populate your first name, last name, business e-mail, and your registration code

NOTE: The registration code is your Provider PIN (i.e., NCA650001), which can be found on the packing lists received with your Vaccines For Children shipments, or in the top right-hand corner of a wasted / expired report generated from the North Carolina Immunization Registry (please add "NCA" to the front of the six-digit PIN#)

For providers who are not enrolled or may not have a Provider PIN, you may use the following generic Provider PIN to register: VAC2021

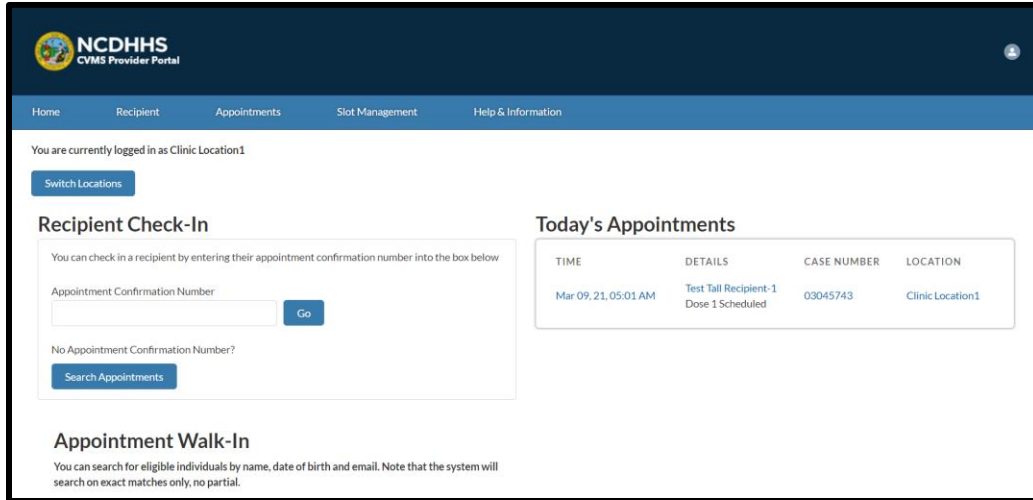
3. You will receive an e-mail with your username and temporary password to log into the portal

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Overview

Overview



The screenshot shows the NCDHHS CVMS Provider Portal. The header includes the NCDHHS logo and navigation links: Home, Recipient, Appointments, Slot Management, and Help & Information. A message states 'You are currently logged in as Clinic Location1'. Below this is a 'Switch Locations' button. The main content area is divided into two sections: 'Recipient Check-In' and 'Today's Appointments'. The 'Recipient Check-In' section has a text input for 'Appointment Confirmation Number' and a 'Go' button. Below it, there is a 'No Appointment Confirmation Number?' section with a 'Search Appointments' button. The 'Today's Appointments' section displays a table with columns: TIME, DETAILS, CASE NUMBER, and LOCATION. The table contains one row: Mar 09, 21, 05:01 AM, Test Tall Recipient-1 Dose 1 Scheduled, 03045743, Clinic Location1. At the bottom, there is an 'Appointment Walk-In' section with a description: 'You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.'

For the locations that enabled the scheduling feature in CVMS, users will be able to complete the following tasks:

1. Checking-in recipients who have scheduled appointments (or have had appointments scheduled for them)
2. Scheduling first and second dose appointments
3. Searching for appointments
4. Canceling appointments

The processes included in this training are for the users with **Healthcare Provider** and **Healthcare Location Manager** profiles.

You will also need to:

- Use the latest version of Chrome, Edge Chromium, Firefox, or Safari browsers. Internet Explorer or Edge (non-Chromium) browsers are not supported.
- Log into the CVMS Provider Portal at <https://covid-vaccine-provider-portal.ncdhhs.gov> using your NCID username and password.

Now, let's get started!

Instructions for Locations that enabled the Scheduling Feature in CVMS

For information on how to activate the scheduling feature in CVMS, please refer to the user guide “CVMS Provider Portal Manage Appointment Scheduling User Guide” at <https://covid19.ncdhhs.gov/cvms-provider-portal-manage-appointment-scheduling-user-guide/download>

Check-In Recipients for Vaccine Administration

Method 1: Begin Vaccine Administration through Today's Appointments

There are three methods to begin the **VACCINE ADMINISTRATION** process.


The provider who will administer the COVID-19 vaccine can select the Recipient under **TODAY'S APPOINTMENTS** on the **HOME PAGE** which will begin the **VACCINE ADMINISTRATION** process.

- 1. Click on the **RECIPIENT'S NAME** to begin the Vaccine Administration
- 2. Begin **VACCINE ADMINISTRATION**

Audience

Healthcare
Provider

Healthcare
Location Manager



HomeRecipientAppointmentsHelp & Information

You are currently logged in as Clinic ABC Loc 1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Today's Appointments

| TIME | DETAILS | CASE NUMBER | LOCATION |
|----------------------|--|-------------|------------------|
| Jan 19, 21, 03:01 PM | Walkin Example Dose 2 Scheduled | 00111942 | Clinic ABC Loc 1 |
| Jan 19, 21, 03:55 PM | Test-1.4 Scenario8 Dose 1 Scheduled | 00111940 | Clinic ABC Loc 1 |
| Jan 19, 21, 04:00 PM | VaccineAdmin Test Dose 1 Scheduled | 00112070 | Clinic ABC Loc 1 |

Method 2: Enter the Appointment Confirmation Number


Alternatively, you can begin the **VACCINE ADMINISTRATION PROCESS** by entering the Recipient's **APPOINTMENT CONFIRMATION NUMBER** that they received after scheduling their appointment online using the scheduling feature in CVMS.

- 1. Enter the **APPOINTMENT CONFIRMATION NUMBER** under the Recipient Check In tool
- 2. Click **GO** to begin the **VACCINE ADMINISTRATION**

Audience

Healthcare
Provider

Healthcare
Location Manager



[Home](#) [Recipient](#) [Appointments](#) [Help & Information](#)

You are currently logged in as Clinic ABC Loc 1

[Switch Locations](#)

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

[Search Appointments](#)

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Today's Appointments

| TIME | DETAILS | CASE NUMBER | LOCATION |
|----------------------|--|-------------|------------------|
| Jan 19, 21, 03:01 PM | Walkin Example Dose 2 Scheduled | 00111942 | Clinic ABC Loc 1 |
| Jan 19, 21, 03:55 PM | Test-1.4 Scenario8 Dose 1 Scheduled | 00111940 | Clinic ABC Loc 1 |
| Jan 19, 21, 04:00 PM | VaccineAdmin Test Dose 1 Scheduled | 00112070 | Clinic ABC Loc 1 |

Method 3: Check In the Recipient in the Appointment Tab

Lastly, the **VACCINE ADMINISTRATION** process can begin from the **APPOINTMENTS TAB**.

1. Navigate to the **APPOINTMENTS TAB**
2. Find the **CORRECT APPOINTMENT BOOKING** for the Recipient you would like to begin the Vaccine Administration for
3. Click the drop-down arrow to the right of their name
4. Select **CHECK IN** to begin **VACCINE ADMINISTRATION**

NCDHHS CVMS Provider Portal

Home Recipient **Appointments** Help & Information

You are currently logged in as County General Hospital - Chicago ER

Appointments
All Appointments
20 items

Search Appointments
Search by Name, Location, Vaccine Status

Search Confirmation Number

From 2021-03-09 To Status New

Search Reset

| Case | Confirmation... | Date | Time | Recipient Na... | DOB | Location | Vaccine Status | Status |
|----------|-----------------|-------------|-------------|--------------------|------------|---------------------|------------------|--------|
| 03113939 | gcdspjfp9n.1 | Mar 9, 2021 | 8:00:00 AM | Wonder Woman | 1940-05-05 | County General H... | Dose 1 Scheduled | New |
| 03113941 | k6nxju95p.1 | Mar 9, 2021 | 9:00:00 AM | N W W | 1980-01-01 | County General H... | Dose 1 Scheduled | New |
| 03113973 | njt65uisi7.1 | Mar 9, 2021 | 12:00:00 PM | Thomas Reece FI... | 1991-03-10 | County General H... | Dose 1 Scheduled | New |

Check In
Book Second Dose

Audience

Healthcare
Provider

Healthcare
Location Manager

Schedule a First Dose Appointment

Step 1 of 8: Search for the Recipient Record

As a provider, you can schedule a first dose appointment using the scheduling feature in CVMS. To do so, **you must first confirm that the recipient is registered in CVMS.**

Once confirmed, you can begin the scheduling process from the CVMS Provider Portal.

- 1. To begin, click the **RECIPIENT** tab
- 2. **SEARCH FOR THE RECIPIENT** with their name and/or date of birth
- 3. Confirm their Recipient Dose Status is **REGISTERED**
- 4. If the recipient is registered, **open the recipient record**

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

More

Create New Recipient

Hint: For quicker and more relevant search results, enter full name (ex: John Smith) and date of birth.

valeria newman

Date of Birth (optional), MM/DD/YYYY

Search

Recipients within CVMS

| First Name | Middle Name | Last Name | Date of Birth | Gender | Vaccine Group | Recipient Dose S... | Email |
|------------|-------------|-----------|---------------|--------|---------------|---------------------|-----------------------|
| Valeria | | Newman | May 31, 1954 | Female | Group 1 | Registered | valerianewman@mail... |

Recipients from Long Term Care Facilities

| First Name | Last Name | Date of Birth | Gender | Dose Number |
|------------|-----------|---------------|--------|-------------|
|------------|-----------|---------------|--------|-------------|

Audience

Healthcare
Provider

Healthcare
Location Manager

Tips

For guidance on how to confirm if a recipient is registered in CVMS (and how to register them if they are not), please reference the **CVMS Provider Portal Point of Care User Guide** at <https://covid19.ncdhhs.gov/cvms-provider-portal-recipient-point-care-user-guide-2/download>.

Step 2 of 8: Begin Scheduling the First Dose Appointment

Once you confirm that you opened the correct Recipient record, make sure that the **recipient’s preferred method of contact is up to date**, or the recipient will not receive an appointment confirmation notification.

- 1. Click the **SCHEDULE FIRST DOSE APPOINTMENT** button in the upper right corner

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryMore

Person Account

Valeria Newman

RegisterSchedule First Dose Appointment

Vaccine Group

Group 1

Recipient Dose Status

Registered

DETAILS

RELATED

Account Name

Valeria Newman

Birthdate

5/31/1954

Gender

Female

Ethnicity

Hispanic or Latino


Audience

Healthcare
Provider

Healthcare
Location Manager

Step 3 of 8: Click Schedule First Dose

Continue into the scheduling feature in CVMS by clicking, **Schedule First Dose**.



Home

Recipient

Appointment

Person Account

Valeria Newman

Vaccine Group

Group 1

Recipient Dose Status

Registered

DETAILS

RELATED

Account Name

Valeria Newman

Birthdate

5/31/1954

Gender

Ethnicity

Schedule First Dose Appointment

Schedule first dose appointment:

Schedule First Dose

Cancel

Register

Schedule First Dose Appointment

Audience

Healthcare
Provider

Healthcare
Location Manager

Step 4 of 8: Search for Location and click, See Availability

A new tab will open and direct you to select a location.

- 1. Search using an **ADDRESS OR ZIP CODE**
- 2. Select a location and click **SEE AVAILABILITY**

YOU HAVE A
SPOT.

TAKE YOUR
SHOT.

Find a location

Enter an address below to find a vaccination center near you

Enter an address or zip code

Search ...

[Use your current location](#)

Continue

YOU HAVE A
SPOT.

TAKE YOUR
SHOT.

Select location

Locations nearest to Wilkesboro, NC 28697, USA [Change](#)

Caldwell County Health Department
25.55 miles away
2345 Morganton Blvd Suite B, Lenoir, North Carolina 28645 828-426-8400
Open 9am - 4:15pm Mon-Thu

See all availability

Audience

Healthcare
Provider

Healthcare
Location Manager

Step 5 of 8: Select an Appointment Date and Time

You will be prompted to select a date and time for the selected location. Only days with available appointments will appear enabled on the calendar.

- 1. Select an **AVAILABLE DATE**
- 2. Select an **AVAILABLE APPOINTMENT TIME**

Select a date & time

2345 Morganton Blvd Suite B, Lenoir, North Carolina 28645 828-426-8400 [Change](#)

1 Appointment 1

Choose a date and time

March 2021

Sun

Mon

Tue

Wed

Thu

Fri

Sat

1

2

3

4

5

6

7

8

9

10

11

12

13

14

15

16

17

18

19

20

21

22

23

24

25

26

27

28

29

30

31

6 appointments available

For Tuesday March 16, 2021

2:45pm

3:00pm

3:15pm

3:30pm

3:45pm

4:00pm

Continue

Audience

Healthcare
Provider

Healthcare
Location Manager

Tips

If you need to change the location of the appointment, click the Change button at the top of the page.

Step 6 of 8: Confirm Appointment Details

Review the appointment details before moving forward. If you need to select a new date and time, you can click the X button to select a new appointment for the same location.

- 1. Click **CONTINUE**

Select a date & time

2345 Morganton Blvd Suite B, Lenoir, North Carolina 28645 828-426-8400 [Change](#)

✓

Appointment 1

Tuesday March 16 4:00PM, 2021

X

Continue

< Back

Audience

Healthcare
Provider

Healthcare
Location Manager

Tips

If you need to change the location of the appointment, this is the last page where you will be able to do so.

Click the Change button at the top of the page.

Step 8 of 8: Review Appointment Confirmation

Once the appointment is complete, the recipient will receive an appointment confirmation via email and / or text/SMS if they provided contact information. It is important that the recipient note their appointment confirmation code and details if they did not provide a preferred method of contact.

1. Review the **APPOINTMENT CONFIRMATION** details

YOU HAVE A
SPOT.

TAKE YOUR
SHOT.

✓

The Appointment is Scheduled.
Your confirmation code is
fack36f3bs
and an email has been sent to

Appointment Details
Appointment 1
Tuesday March 16 4:00PM, 2021
Caldwell County Health Department
2345 Morganton Blvd Suite B, Lenoir, North Carolina 28645 828-426-8400
First Name
Valeria
Middle Name

Last Name
Newman
Address
123 Main ST.
City
Wilkesboro
County
Wilkes
State
North Carolina
Zip Code
28679

Appointment Confirmed
Thank you for scheduling an appointment to receive your COVID-19 vaccine! Your vaccination appointment has been successfully scheduled. Please show this code when you check in for your appointment.
Confirmation Code
fack36f3bs

Recipient: Valeria Newman
Appointment 1
Tuesday March 16 2021 at 04:00PM
Caldwell County Health Department
2345 Morganton Blvd Suite B, Lenoir, North Carolina 28645 828-426-8400

Instructions

- Please arrive 15 minutes before your scheduled time.
- Please bring a printed copy of this email or have it ready on your mobile phone. You will need so you can provide to give your confirmation number to the vaccinating provider at check-in.

Notes

Please add us to your safe sender list to make sure you receive emails from us about your appointment.

Additional information

Visit YourSpotYourShot.nc.gov for accurate information about the COVID-19 vaccines. To slow the spread of COVID-19 and save lives, continue to practice the 3 Ws - wear a mask, wait

Audience

Healthcare
Provider

Healthcare
Location Manager

Tips

Recipients will receive an appointment confirmation to the email address and / or phone number provided with their confirmation code and instructions (screenshot on the right).

If they did not select a preferred method of contact, they should make note of their appointment details.

Schedule a Second Dose Appointment

Method 1 - Step 1 of 3: Book Second Dose at Time of First Dose Administration

If a **RECIPIENT** used the scheduling feature in CVMS to book their first appointment and received a vaccine product that requires a second dose, the final page of the **VACCINE ADMINISTRATION** process will display a button labeled **BOOK SECOND DOSE**.

Note, second dose appointments use the same **AVAILABILITY SCHEDULE** as first dose appointments

- 1. To begin, click the **BOOK SECOND DOSE** button

✓

✓

Schedule Follow Up

Second Dose Disclaimer

The COVID-19 vaccine requires a booster dose 21 days after your initial dose.

Schedule Second Dose Appointment

Schedule second dose appointment for confirmation number: r5r9naxiek.

Book Second Dose

Medical History

Wonder Woman

DOB: May 5, 1940

Age: 80

Gender

Other

Race

Other

Ethnicity

Unknown

Audience

Healthcare
Provider

Healthcare
Location Manager

Tips

Healthcare Providers will only see this option for Recipients who booked their first dose appointment through the scheduling feature in CVMS.

Method 2 - Step 1 of 3: Book Second Dose After First Dose Administration

You may choose to book a second dose appointment after first dose vaccine administration.

1. To begin, navigate to the **LOCATIONS** tab
2. Find the **DOSE 1 ADMINISTERED** appointment
3. Open the menu and click **SCHEDULE SECOND DOSE**

Audience

Healthcare
Provider

Healthcare
Location Manager

Tips

Schedule the **SECOND DOSE APPOINTMENT** while the recipient is on-site to confirm that you have availability at the planned appointment time.

CVMS will prevent you from scheduling a second dose appointment if the appointment has already been created or the recipient is listed as receiving a one dose vaccine product.

NCDHHS CVMS Provider Portal

You are currently logged in as Clinic Location1

Appointments All Appointments 8 items

Cancel Appointment

Search Appointments: dose 1 administered

Search Case/Confirmation Number:

From: 2021-03-23

To:

Status: --- None ---

Search Reset

| <input type="checkbox"/> | Case | Confirmati... | Date | Time | Recipient ... | DOB | Location | Vaccine St... | Status |
|--------------------------|----------|---------------|--------------|------------|---------------|------------|-----------------|------------------|----------------------|
| <input type="checkbox"/> | 03046357 | bnddk1of1j.1 | Mar 23, 2021 | 2:05:09 AM | JJ Gillian | 1950-03-10 | Sked Test Loc56 | Dose 1 Admini... | Closed |
| <input type="checkbox"/> | 03045857 | r1cmdjn3r5.1 | Mar 23, 2021 | 2:10:34 AM | jenn G yu | 1998-09-06 | | Dose 1 Admini... | Check In |
| <input type="checkbox"/> | 03046413 | r7cqf4rwoo.1 | Mar 23, 2021 | 2:11:55 AM | Jennifer G Yu | 1998-09-06 | TESTCrunkLoc... | Dose 1 Admini... | Schedule Second Dose |

Step 2 of 3: Select a Date and Time

The scheduling feature in CVMS will appear in a new tab and will **default to the same location as the first dose** appointment. If the recipient needs to change the location, the new provider location must book the appointment for the recipient. For single-dose vaccines, second dose appointments will not be permitted.

1. Select a date for the second dose

NOTE: The first available date for a second dose is based upon the product the recipient received for their first dose (21 days or 28 days). For example, if a recipient was vaccinated with Pfizer with a recommended 21-day interval for their second dose, the earliest possible appointment for their second dose would be 21 days after their first dose. However, the recipient should be scheduled as close to the recommended interval as possible.

2. Select an available time slot for the second dose

Schedule Dose 2

2110 Blue Ridge Rd, Raleigh, North Carolina 27607 [Change](#)

Now that you have received your first dose, please choose a time for your follow up appointment.

2

Appointment 2

Choose a date and time

April 2021

Sun

Mon

Tue

Wed

Thu

Fri

Sat

1

2

3

4

5

6

7

8

9

10

11

12

13

14

15

16

17

18

19

20

21

22

23

24

25

26

27

28

29

30

9 appointments available

For Sunday April 11, 2021

8:00am

9:00am

10:00am

11:00am

12:00pm

1:00pm

2:00pm

3:00pm

4:00pm

Complete Appointment

< Back

Audience

Healthcare
Provider

Healthcare
Location Manager

Tips

You will not be able to schedule an appointment too early. The scheduling feature in CVMS will show you the correct timeline for the vaccine your recipient received.

Step 3 of 3: Confirm Appointment

Now, you will complete the 2nd dose appointment booking.

- 1. Click **COMPLETE APPOINTMENT**
- 2. Review the details of the scheduled appointment
- 3. The recipient will only receive a reminder notification if they provided an email and/or phone number and agreed to reminders when they scheduled their 1st dose appointment

Schedule Dose 2

2110 Blue Ridge Rd, Raleigh, North Carolina 27607 [Change](#)

Now that you have received your first dose, please choose a time for your follow up appointment.

✓

Appointment 2

Thursday April 15 9:00AM, 2021

✕

Complete Appointment

< Back

✓

The Appointment is Scheduled.

Your confirmation code is

r5r9naxiek.

and an email has been sent to

ch*****@gmail.com

Appointment Details

Location

County General Hospital - Chicago ER

Location address

2110 Blue Ridge Rd, Raleigh, North Carolina 27607

Appointment 2: Date and time

Thursday April 15 9:00AM, 2021

Email

ch*****@gmail.com

Audience

Healthcare
Provider

Healthcare
Location Manager

Tips

You will not be able to change the location of the appointment through the appointment confirmation email.

You must cancel the appointment and the new location must schedule the appointment for the recipient.


The confirmation code for the 2nd dose appointment is the same as the confirmation code for the 1st dose appointment.

Search Scheduled Appointments

Step 1 of 5: Navigate to Appointments Tab

Periodically, you may want to verify how many appointments have been scheduled for a specific day or period. Searching for upcoming appointments can be done from the Appointments Tab.

- 1. To begin, navigate to the **APPOINTMENTS** tab.



Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

More

You are currently logged in as Clinic Location1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Today's Appointments

| TIME | DETAILS | CASE NUMBER | LOCATION |
|------|---------|-------------|----------|
|------|---------|-------------|----------|

Audience

Healthcare
Provider

Healthcare
Location Manager

Step 2 of 5: Review and Plan Appointments for the Day

You will first need to enter a date range.

- 1. Enter the specific dates in the two fields **FROM** and **TO**
- 2. Click **SEARCH**

Home

Recipient

Appointments

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More

You are currently logged in as County General Hospital - Chicago ER

Appointments

All Appointments

9 items

Search Appointments

Search Confirmation Number

From

2021-03-10

To

2021-03-10

Status

--- None ---

Search

Reset

Cancel Appointment

| <input type="checkbox"/> | Case | Confirmation N... | Date | Time | Recipient Name | DOB | Location | Vaccine Status | Status |
|--------------------------|----------|-------------------|-------------|-------------|----------------------|------------|-----------------------|---------------------|----------|
| <input type="checkbox"/> | 03113945 | r137tzquwk.1 | Mar 9, 2021 | 6:39:41 AM | test test | 1999-09-09 | County General Hos... | Dose 1 Administered | Closed |
| <input type="checkbox"/> | 03113949 | n5k31u3179.1 | Mar 9, 2021 | 7:03:00 AM | sked1 testuser | 1989-10-03 | County General Hos... | Dose 1 Administered | Closed |
| <input type="checkbox"/> | 03113952 | n5k31u3179.2 | Mar 9, 2021 | 7:49:50 AM | sked1 testuser | 1989-10-03 | County General Hos... | Dose 2 Administered | Closed |
| <input type="checkbox"/> | 03113943 | fp316c8jc3.1 | Mar 9, 2021 | 8:00:00 AM | Wonder Woman | 1940-05-05 | County General Hos... | Dose 1 Canceled | Canceled |
| <input type="checkbox"/> | 03113939 | gcdspjfp9n.1 | Mar 9, 2021 | 8:00:00 AM | Wonder Woman | 1940-05-05 | County General Hos... | Dose 1 Scheduled | New |
| <input type="checkbox"/> | 03113941 | k6nxju95p.1 | Mar 9, 2021 | 9:00:00 AM | N W W | 1980-01-01 | County General Hos... | Dose 1 Scheduled | New |
| <input type="checkbox"/> | 03113960 | drch74hi16.1 | Mar 9, 2021 | 9:17:35 AM | sked2 testuser | 1999-12-19 | County General Hos... | Dose 1 Administered | Closed |
| <input type="checkbox"/> | 03113973 | njt65uisi7.1 | Mar 9, 2021 | 12:00:00 PM | Thomas Reece Flowers | 1991-03-10 | County General Hos... | Dose 1 Scheduled | New |
| <input type="checkbox"/> | 03113797 | 391nxsq8t.1 | Mar 9, 2021 | 6:30:55 PM | Wonder Woman | 1940-05-05 | County General Hos... | Dose 1 Scheduled | New |

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Next →

Audience

Healthcare Provider

Healthcare Location Manager

Tips

The number of appointments will show at the top left of the page.

Step 3 of 5: Search by Name, Location, or Vaccine Status

In the **SEARCH APPOINTMENT** field, you can search including recipient name, location name, or vaccine status. If multiple locations are available, you can enter the location name. Vaccine statuses include “Dose 1 Scheduled,” “Dose 1 Administered,” “Dose 2 Scheduled,” and “Dose 2 Administered.”

- 1. Enter the keyword in the **SEARCH APPOINTMENTS** field
- 2. Click **SEARCH**
- 3. Click **RESET** to restore the standard view

Audience

Healthcare
Provider

Healthcare
Location Manager

Home

Recipient

Appointments

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You are currently logged in as County General Hospital - Chicago ER

Appointments

All Appointments

4 items

Search Appointments

Dose 1 Scheduled

Search Confirmation Number

From

2021-03-09

To

2021-03-09

Status

--- None ---

Search

Reset

Cancel Appointment

| <input type="checkbox"/> | Case | Confirmation N... | Date | Time | Recipient Name | DOB | Location | Vaccine Status | Status | |
|--------------------------|----------|-------------------|-------------|-------------|----------------------|------------|-----------------------|------------------|--------|--|
| <input type="checkbox"/> | 03113939 | gcdspjfp9n.1 | Mar 9, 2021 | 8:00:00 AM | Wonder Woman | 1940-05-05 | County General Hos... | Dose 1 Scheduled | New | |
| <input type="checkbox"/> | 03113941 | k6nxju95p.1 | Mar 9, 2021 | 9:00:00 AM | NWW | 1980-01-01 | County General Hos... | Dose 1 Scheduled | New | |
| <input type="checkbox"/> | 03113973 | njt65uisi7.1 | Mar 9, 2021 | 12:00:00 PM | Thomas Reece Flowers | 1991-03-10 | County General Hos... | Dose 1 Scheduled | New | |
| <input type="checkbox"/> | 03113797 | 391nxsq8t.1 | Mar 9, 2021 | 6:30:55 PM | Wonder Woman | 1940-05-05 | County General Hos... | Dose 1 Scheduled | New | |

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Next →

Step 4 of 5: Search by Using Recipient's Confirmation Number

For locations that enable the scheduling feature in CVMS, recipients that book an appointment will be sent a unique confirmation code for their appointment. You can search for a specific recipient's appointment using this confirmation code.

- 1. Enter the confirmation code in the field labeled **SEARCH CONFIRMATION NUMBER**
- 2. Click **SEARCH**

Audience

Healthcare Provider

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You are currently logged in as County General Hospital - Chicago ER

Appointments

All Appointments

1 items

Search Appointments

Search by Name, Location, Vaccine Status

Search Confirmation Number

gcdspjfp9n.1

From

2021-03-09

To

2021-03-09

Status

--- None ---

Search

Reset

| <input type="checkbox"/> | Case | Confirmation N... | Date | Time | Recipient Name | DOB | Location | Vaccine Status | Status |
|--------------------------|----------|-------------------|-------------|------------|----------------|------------|-----------------------|------------------|--------|
| <input type="checkbox"/> | 03113939 | gcdspjfp9n.1 | Mar 9, 2021 | 8:00:00 AM | Wonder Woman | 1940-05-05 | County General Hos... | Dose 1 Scheduled | New |

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Step 5 of 5: Search by Appointment Status

Another helpful view is Appointment Status over to the right. Options include:

- New – recipients with an upcoming appointments
- Closed – scheduled recipients that completed their appointment
- Canceled – appointment canceled either by the recipient or by the provider

1. Select a **STATUS**
2. Click Search

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Tips

Search using the **NEW** status filter to quickly see which appointments were booked overnight.

Recipients can cancel their appointment directly in the scheduling feature in CVMS through a link included in the confirmation email or the text message.

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You are currently logged in as County General Hospital - Chicago ER

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All Appointments

4 Items

Cancel Appointment

Search Appointments

Search Confirmation Number

From

To

Status

Search

Reset

| <input type="checkbox"/> | Case | Confirmation N... | Date | Time | Recipient Name | DOB | Location | Vaccine Status | Status |
|--------------------------|----------|-------------------|-------------|------------|----------------|------------|-----------------------|---------------------|--------|
| <input type="checkbox"/> | 03113945 | r137tzquwk.1 | Mar 9, 2021 | 6:39:41 AM | test test | 1999-09-09 | County General Hos... | Dose 1 Administered | Closed |
| <input type="checkbox"/> | 03113949 | n5k31u3179.1 | Mar 9, 2021 | 7:03:00 AM | sked1 testuser | 1989-10-03 | County General Hos... | Dose 1 Administered | Closed |
| <input type="checkbox"/> | 03113952 | n5k31u3179.2 | Mar 9, 2021 | 7:49:50 AM | sked1 testuser | 1989-10-03 | County General Hos... | Dose 2 Administered | Closed |
| <input type="checkbox"/> | 03113960 | drch74hii6.1 | Mar 9, 2021 | 9:17:35 AM | sked2 testuser | 1999-12-19 | County General Hos... | Dose 1 Administered | Closed |

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Cancel Appointments

Step 1 of 5: Navigate to Appointments Tab

If a scheduled appointment needs to be cancelled, you can cancel it and notify the recipient of the reason for cancellation.

NOTE: To begin, navigate to the **APPOINTMENTS** tab



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You are currently logged in as Clinic Location1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Today's Appointments

| TIME | DETAILS | CASE NUMBER | LOCATION |
|------|---------|-------------|----------|
|------|---------|-------------|----------|

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Step 2 of 5: Search for the Recipient by Name, Appointment Date, Confirmation Code, and/or Vaccine Status

You will first need to find the appointment you wish to cancel. You can search using the recipient’s name or confirmation code as well as filter by the date and/or status.

- 1. Search for the appointment(s) you need to cancel

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You are currently logged in as Clinic Org1

Appointments

All Appointments

3 items

Search Appointments

Search Case/Confirmation Number

From

2021-04-01

To

Status

--- None ---

Search

Reset

3 records found.

| <input type="checkbox"/> | Case | Confirmati... | Date | Time | Recipient ... | DOB | Location | Cancellatio... | Vaccine ... | Status | |
|--------------------------|----------|---------------|--------------|------------|----------------|------------|----------|----------------|-------------------|--------|--|
| <input type="checkbox"/> | 03499186 | | Apr 12, 2021 | 1:11:27 PM | Walkin Example | 1965-12-12 | | | Dose 1 Schedul... | New | |
| <input type="checkbox"/> | 03499652 | | Apr 12, 2021 | 6:07:01 PM | Steve Rodger | 2000-01-01 | | | Dose 1 Schedul... | New | |
| <input type="checkbox"/> | 03499746 | d75449mzu5.1 | Apr 12, 2021 | 7:00:00 PM | Peter Parker | 2000-03-03 | | | Dose 1 Schedul... | New | |

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Step 3 of 5: Cancel Up to 20 New Appointments

You can cancel up to 20 appointments at a time.

- 1. Click the checkbox at left of the appointments you wish to cancel (up to 20)
- 2. Click the **CANCEL APPOINTMENT** button in the upper right.

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You are currently logged in as Clinic Org1

Appointments

All Appointments

3 items

Cancel Appointment

Search Appointments

Search Case/Confirmation Number

From

To

Status

Search by Name, Location, Vaccine Status

2021-04-01

--- None ---

Search

Reset

3 records found.

| <input type="checkbox"/> | Case | Confirmati... | Date | Time | Recipient ... | DOB | Location | Cancellatio... | Vaccine ... | Status | |
|-------------------------------------|----------|---------------|--------------|------------|----------------|------------|----------|----------------|-------------------|--------|--|
| <input checked="" type="checkbox"/> | 03499186 | | Apr 12, 2021 | 1:11:27 PM | Walkin Example | 1965-12-12 | | | Dose 1 Schedul... | New | |
| <input type="checkbox"/> | 03499652 | | Apr 12, 2021 | 6:07:01 PM | Steve Rodger | 2000-01-01 | | | Dose 1 Schedul... | New | |
| <input type="checkbox"/> | 03499746 | d75449mzu5.1 | Apr 12, 2021 | 7:00:00 PM | Peter Parker | 2000-03-03 | | | Dose 1 Schedul... | New | |

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Tips

The ability to cancel 20 appointments at a time can be particularly helpful if you have a capacity issue and need to quickly cancel some appointments for the day that cannot be reassigned.

Step 4 of 5: Provide Cancellation Reason and Cancel Appointment

If the appointment was made through the scheduling feature in CVMS *and* the Recipient opted “in” for receiving text and/or email notifications, they will be notified of the cancellation.

- 1. Input a reason for cancelling the appointment(s) from the drop-down menu (you may optionally add a cancellation description in the free text field)
- 2. Click the **CANCEL APPOINTMENT** button to confirm the cancellation

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You are currently logged in as

Appointments

All Appointments

3 items

Cancel Appointments

| DATE | TIME | RECIPIENT NAME | DOB | PROVIDER LOCATION | CANCELLATION REASON | CANCELLATION DESCRIPTION |
|--------------|----------|----------------|------------|-------------------|--|--------------------------|
| Apr 12, 2021 | 01:11 PM | Walkin Example | 1965-12-12 | Clinic Org1 | <div>choose one...<div>choose one...<div>Duplicate</div><div>Recipient Pre Appointment Cancellation</div><div>Insufficient Inventory</div><div>Recipient Refusal</div></div></div> | |

Cancel Appointment

Status

--- None ---

Search

Reset

Status

Case

Cor

| | | | | | | | | | |
|-------------------------------------|----------|--------------|--------------|----------------|--------------|-------------------|-------------------|-----|--|
| <input checked="" type="checkbox"/> | 03499186 | Apr 12, 2021 | 1:11:27 PM | Walkin Example | 1965-12-12 | Dose 1 Schedul... | New | | |
| <input type="checkbox"/> | 03499652 | Apr 12, 2021 | 6:07:01 PM | Steve Rodger | 2000-01-01 | Dose 1 Schedul... | New | | |
| <input type="checkbox"/> | 03499746 | d75449mzu5.1 | Apr 12, 2021 | 7:00:00 PM | Peter Parker | 2000-03-03 | Dose 1 Schedul... | New | |

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Tips

You may still want to follow up with a call to the recipient just to make sure they saw the cancellation notification. Also, if they did *not* sign up for the text and/or email notifications, they will not know that the appointment has been cancelled.

Step 5 of 5: View Appointment / Cancellation History

To view a record of a Recipient’s appointment history, navigate to the Recipient tab, locate the Recipient’s record, and select **RELATED** tab. The Recipient’s appointment records will appear. Selecting an appointment record will bring up the details of that appointment, including a **CANCELLATION REASON** if applicable.

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Tips

You may need to reschedule the appointment if the recipient has not already received their vaccination. **If they did *not* sign up for the text and/or email notifications, they will not receive a booking confirmation.**

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Person Account

Walkin Example

Eligibility Status

Approved

Priority

Phase 1a

Recipient Dose Status

Dose 1 Canceled

DETAILS

RELATED

Appointments (2)

| Appointment | Date and Time of Vaccin... | Vaccine Status | Vaccine |
|-------------|----------------------------|-----------------|---------|
| 00111719 | | Dose 1 Canceled | |
| 00111716 | | Registered | |

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DETAILS

RELATED

Account Name

Clinic ABC Loc 1

Contact Name

Walkin Example

Appointment DateTime

1/13/2021, 3:59 PM

Cancellation Reason

RECIPIENT CANCELLED

Vaccine Status

Dose 1 Canceled

Vaccine

Vaccine Inventory

Injection Site

Automatic Cancellations

There are a few scenarios that may result in an automatic cancellation:

1 - If a Recipient appears in **TODAY'S APPOINTMENTS** (either through the Appointment Walk-In process or due to a scheduled appointment) but does not complete their appointment within 24 hours, the appointment will be **AUTOMATICALLY** cancelled, and their Dose Status will update to **DOSE 1 (or 2) CANCELLED**.

2 - If a Recipient creates multiple appointments (for example at different locations in hopes of being vaccinated as quickly as possible), all the remaining appointments will be automatically cancelled as soon as one of the appointments is changed to a **DOSE 1 (or 2) ADMINISTERED** status.

3 - Providers using CVMS Direct (Electronic Health Record system integration with CVMS) may also notice cancelled appointments appearing in the system. Those appointments are created during the integration process and will be automatically cancelled and marked as **DUPLICATE** as they are a replica of the scheduled appointment.

Audience





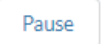
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Appendix

Additional Notes

Key Items:

- **Hyperlinks** appear as light blue and will provide additional information or navigation.
- *** Asterisks** are used to denote required information.
-  A Toggle can be clicked to see selectable options.
-  A Pen can be clicked to make edits to the field.
-   Navigation Buttons can be clicked on to progress to the “next” or the “previous” step in a task.
-  A Pause button can be clicked if you wish to step away / and return to your form later. You will be prompted to review your previously entered data upon your return/ login.

Contact Information:

- All questions should be directed to the CVMS Help Desk Portal at https://ncgov.servicenow.services.com/csm_vaccine.

Supported Web Browsers:

- Please use the latest version of Chrome, Firefox, Safari, or Edge Chromium browsers to access CVMS.
- For more information on supported browsers, see https://help.salesforce.com/articleView?id=getstart_browsers_sfx.htm&type=5
- Note: Internet Explorer and Edge (non-Chromium) browsers are not compatible with CVMS.

User Guide Change Log

| Version | Date of Change | Changes Made | Impacted Slides | Author |
|---------|----------------|--|-----------------|-----------------------|
| 1 | 3/15/2021 | <ul style="list-style-type: none">• Creation of guide addendum | N/A | Jerilyn MacLaren-Hall |
| 2 | 4/7/2021 | <ul style="list-style-type: none">• Removed explanations on 2nd dose appointment cancellations | | Kevin Kauffman |
| 3 | 4/16/2021 | <ul style="list-style-type: none">• Updated Cancellation branding with picklist• Removed guidance to enter recipient demographic information from 1st dose appointment booking | 33-37 18 | Steve DiGangi |